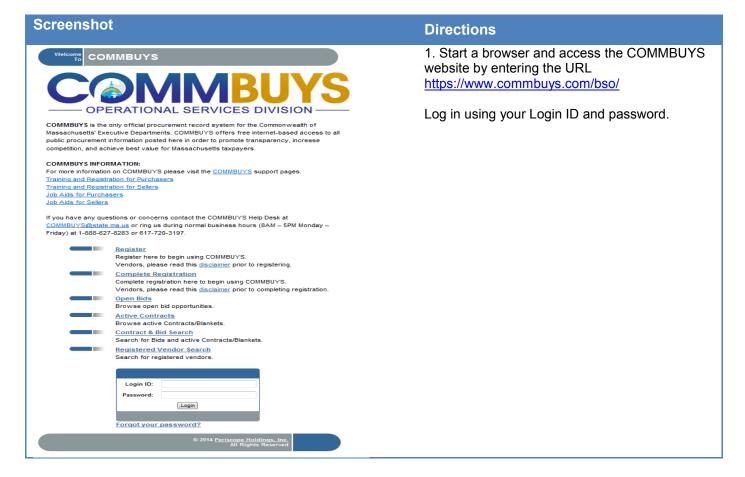# Job Aid:

Organization Administrator: Multiorg Approval Path

This Job Aid shows how to:

- Create, manage and adjust approval paths to add a multiorg approver

Overview and Requirements:

Setting up a multiorg approval path requires the participation of Organization Administrators (OAs) from each participating organization. **It is critical to ensure legal foundation for adding other agency users. The organizations involved must have a valid Interagency Service Agreement (ISA) or some type of legal authority.** The OA from one organization gives access to a user to be an approver on another organization's approval path, and creates a multiorg approval path. Thought and structure must be developed or known to ensure approval paths are created properly, therefore we recommend only after discussion with the Agency Chief Procurement Officer, Chief Fiscal Officer and COMMBUYS liaisons should Approval Paths be entered into the system by the Organization Administrator (OA). The OA has the ability to add, edit, and remove all organization approval paths.

Screenshot	Directions
	1. Start a browser and access the COMMBUYS website by entering the URL https://www.commbuys.com/bso/ Log in using your Login ID and password.

Job Aid:
Organization Administrator: Multiorg Approval Path

Screenshot	Directions
	2. At the OA home page select **Configure Approval Settings**.
	3. Click **Maintain Agency Approval Type Sequence**
	4. The displayed list shows only the **Approval Types** your organization currently can utilize. Remember Approval Types are categories to support approval paths; they are not approval paths themselves. If an Approval Type is used in an Approval Path, you cannot edit the Approval Type. If an Approval Type is not used in an Approval Path, you can edit the Approval Type, but can only change the Description, Priority, and Status fields.

Screenshot	Directions
Maintain Organization Approval Types for: Operational Services Division Organization: 1080 - Operational Services Division | Approval Type ID	Description
new:		| | Priority	Status	Delete
0	Active ▼	☐		**Note:** This page is split into two images for ease of viewing. 5. To enter a new approval type, enter a 5 digit alpha numeric unique identifier for the **Approval Type ID**. • For large organizations with many types of approvals, you may use this identifier to represent a chronological path represented by using the three letter department (HR123) or (IT001). Name this Approval Path with a general **Description** of its purpose. It could be related to the individual type of purchase, or the level of authority needed to approve it. Assign this Approval Path a **Priority**. • 1 is lowest priority ; 99 is the highest. • The system will route documents according to priority. An emergency purchase should use a high priority while office supplies typically have a low priority. Click **Save & Continue** to save the current path and add another, or click **Save & Exit** to return to the previous screen. Click **Cancel & Exit** to return to the homepage.
Organization Administrator Home Department/Approval/Users Document Settings System Configuration Maintenance Tables **Maintain Agency Organizations/Departments/Locations** This section is used to administer agency organization, department and location information **Configure Approval Settings** This section is used to configure system settings for approval path maintenance **Maintain Agency Approval Paths** This section is used to administer agency approval paths **Maintain Agency Users** This section is used to maintain agency users **Maintain Assignment of Commodity-EPPs to Purchasers** This section is used to administer the association of purchasers with commodity codes **Maintain Document Attachment Repository** This section is used to maintain files in the document attachment repository Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	6. Click **Maintain Agency Approval Paths** on the Organization Administrator Homepage.

Screenshot	Directions

Directions:

7. The Maintain Agency Approval Paths icon, will display all the approval paths you currently have, both active and inactive.

Note: A Search box appears if your organization has more than 25 approval paths. Use the available search fields to locate an Approval Path you want to modify.

Click the Path ID to edit existing Approval Paths, or click **Add New Approval Path** (at the bottom of the page) to build a new path.

Screenshot:

Approval Path Maintenance for: Organization DEF

Search Using: ALL of the criteria ▼

Search Fields:
- Approval Path ID
- Approval Path Name
- Organization
- Department
- Location
- Approval Type
- Status
- Access Role
- Document Type
- Doc Sub Type
- Approver User

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0 1 2 3 4 5 6 7 8 9 10

[Find It] [Clear]

Path ID	Name	Organization	Approval Type	Dollar Range From	Dollar Range To	Status
BID1	Software Purchases	2100 - Organization DEF	LEVEL 10 - Manager	$0.00	$9,999,999,999.00	Active
BUD19	Budgetary Approval	2100 - Organization DEF	BUD17 - Budget Office Approval	$0.00	$9,999,999,999.00	Active
DTA13	POS	2100 - Organization DEF	SER35 - Services	$0.00	$50,000.00	Active
ED001	Software Purchases	2100 - Organization DEF	LEVEL 10 - Manager	$0.00	$9,999,999,999.00	Active
ED002	Software Purchases	2100 - Organization DEF	LEVEL 10 - Manager	$0.00	$99,999,999.00	Active
ED003	Software Purchases	2100 - Organization DEF	LEVEL 10 - Manager	$0.00	$999,999.00	Active
ED004	Office Supplies	2100 - Organization DEF	LEVEL 1 - Supervisor	$0.00	$99,999,999.00	Active
ED006	Office Supplies	2100 - Organization DEF	LEVEL 10 - Manager	$0.00	$999,999.00	Active
ED008	Software Purchases	2100 - Organization DEF	LEVEL 10 - Manager	$0.00	$9,999,999,999.00	Active
ED009	All other purchases	2100 - Organization DEF	LEVEL 10 - Manager	$0.00	$99,999,999.00	Active
ED010	All other	2100 - Organization DEF	LEVEL 1 - Supervisor	$0.00	$999,999.99	Active
ED045	Office Supplies	2100 - Organization DEF	LEVEL 1 - Supervisor	$0.00	$9,999,999.00	Active
EXC	Exceptions	2100 - Organization DEF	BOF23 - Business Office	$25,000.00	$1,000,000.00	Inactive
EXC17	Exceptions	2100 - Organization DEF	BOF17 - Business Office	$25,000.00	$9,999,999,999.00	Inactive
EXC18	Exceptions	2100 - Organization DEF	EXC18 - Exceptions	$0.00	$50,000.00	Inactive
EXC22	Exceptions	2100 - Organization DEF	BOF22 - Business Office	$25,000.00	$1,000,000.00	Inactive
EXC24	Exceptions	2100 - Organization DEF	BOF24 - Business Office	$25,000.00	$999,999.00	Inactive
FRE17	Frequent Purchases	2100 - Organization DEF	SUP17 - Supervisor	$0.00	$49,999.00	Inactive
FRE18	Frequent Purchases	2100 - Organization DEF	MAN17 - Manager	$49,999.00	$9,999,999,999.00	Inactive
FRE22	Frequent purchases	2100 - Organization DEF	SUP22 - Supervisor	$0.00	$49,999.00	Inactive
FRE221	Frequent purchases	2100 - Organization DEF	MAN22 - Manager	$0.00	$999,999.00	Inactive
FRE23	Frequent Purchases	2100 - Organization DEF	SUP23 - Supervisor	$0.00	$49,999.00	Inactive
FRE24	Frequent Purchases	2100 - Organization DEF	SUP24 - Supervisor	$0.00	$49,000.00	Inactive
FRE26	Frequent Purchases	2100 - Organization DEF	MAN24 - Manager	$0.00	$999,999.00	Inactive
FRE33	Frequent Purchases	2100 - Organization DEF	MAN23 - Manager	$49,999.00	$999,999.00	Inactive

1-25 of 83
1 2 3 4

[Add New Approval Path] [Global Approver Replace] [Exit]

Screenshot	Directions

Directions

8. Enter the required information, proceeding left to right through the tabs. Fields with an asterisk (*) are required fields.

When finished with one tab of fields, click **Save & Continue** then proceed to the next tab.

General Tab:

- **Approval Path ID** – A unique 5-digit alpha numeric ID related to the use of the path. For example if it is a path for a specific department, you may choose to use the first three characters of the department name followed by a path number.
- **Description or Approval Path Name –** The path name should indicate the kind of path. E.g., using the HR Approval type referenced above, this path could be named Contract Employee Approval.
- **Approval Type** – A pull-down list of your organization's Approval types.
- **Dollar Range** – Required; to enable for all dollar amounts, set dollar range from 0.00 to 9,999,999,999,999.99.
- **Status** – Active/Inactive.
- **Roles** – Designates the COMMBUYS role that may use this Approval Path. If no roles are selected, this path will apply to all roles.
- **Approval Doc/Doc Sub Types** – Select all document types that will apply to this path. If no document types are selected, the approval path applies to all document types so long as the other criteria of the path are met
- **Select Approvers -** Use the eyeglass box to search for the desired approvers (more detail in next step)
- **Level -** Level 1 is the first approver, and if additional levels are needed level 2 would be the second approver, etc.
- **Type -** A Primary approver indicates the required approver. Choosing an alternate approver makes the document available to both approvers. Either can approve the document. Only one alternate and one primary are allowed per level.

Click **Save & Continue**.

Screenshot	Directions
User Lookup for: Operational Services Division Search Using: ALL of the criteria Search Fields: First Name: Alyssa Last Name: Arnold Login ID: Organization: Department of Revenue Department: Location: User Role: Basic Purchasing / Department Access / Inventory User / Accounts Payable Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 10 [Find It] [Clear]	9. A **User Lookup** window opens. To search for user by Organization, use the Organization drop down to find the multiorg approver. You can use any of the other search field instead if that is easier. Click **Find It** **Remember**: • An ISA is required in order to select the appropriate user. • Just because some users are an option, does not mean you have permission to designate them as an approver.
User Lookup for: Operational Services Division Search Using: ALL of the criteria Search Fields: First Name: Alyssa Last Name: Arnold Login ID: Organization: Department of Revenue Department: Location: User Role: Basic Purchasing / Department Access / Inventory User / Accounts Payable Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 10 [Find It] [Clear] **Select** / Login ID / First Name / Last Name / Status / Role(s) ⦿ ALYSSAA Alyssa Arnold Active Basic Purchasing / Grant Multiorg Approval Rights [Select] [Close Window]	10. Select the eligible user for this approval path by clicking the **Select** radio button. Click **Select** at the bottom of the page. Note: User from another organization only appear once they have been granted multiorg approval rights.
Approvers Approver User / Level / Type Arnold, Alyssa ⦿ Primary ◯ Alternate ⦿ Primary ◯ Alternate	11. The selected user appears as an approver. user If need to designate an additional approver, select from the drop down to find an approver with your organization, or use the eyeglass icon again to find a user from another organization. Click the **UNSPSC Code** tab.

Screenshot	Directions
Approval Path IT001 - IT Purchases General Change Order Misc/Freight Department/Location Email **U N S P S C Code** Vendor Summary No specific U N S P S C Segment-Family/Class found for this approval path, therefore the approval path is considered to be associated with all the U N S P S C Segment-Family/Class codes. Add U N S P S C Segment-Family/Class	12. Click **Add UNSPSC Segment-Family/Class** button to add commodity codes to this approval path. A new window opens showing a search box, which we will see on the next slide. In this example we will search for IT related UNSPSC codes, to which we assign to this approval path. Note: A path that has this feature enabled applies to all departments in the organization. That is, if you create an approval path based on a Department/Location, you should <u>not</u> add UNSPSC Code to that path.
Approval Path IT001 - Search NIGP Codes General Change Order Misc/Freight Department/Location Email **U N S P S C Code** Vendor Summary Search Using: ALL of the criteria ▼ Category 43 - Information Technology Broadca... ▼ Search Fields: Segment-Family ID ___ Segment-Family Description ___ Class ID ___ Class Description ___ Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 10 Result Type: Class ▼ Find It Clear 	**Select** ☑	**Segment-Family ID**	**Description**
☑	43-19	Communications Devices and Accessories
☑	43-20	Components for information technology or broadcasting or tel
☑	43-21	Computer Equipment and Accessories
☑	43-22	Data Voice or Multimedia Network Equipment or Platforms and
☑	43-23	Software	 Save & Exit Save & Continue Cancel & Exit	13. Click the **Select** button adjacent to the correct corresponding UNSPSC codes. Note how the top Select button, will select all. Click **Save & Continue** to perform another search and add further codes, or click **Save & Exit** to return to the saved view of UNSPSC codes for this approval path. .
Approval Path IT001 - IT Purchases General Change Order Misc/Freight Department/Location Email **U N S P S C Code** Vendor Summary Confirmation Messages • Changes saved successfully. Approval Path U N S P S C Segment-Family List 	Segment-Family ID	Description	Delete ☐
43-19	Communications Devices and Accessories	☐
43-20	Components for information technology or broadcasting or tel	☐
43-21	Computer Equipment and Accessories	☐
43-22	Data Voice or Multimedia Network Equipment or Platforms and	☐
43-23	Software	☐ | Approval Path U N S P S C Class List | Segment-Family-Class	Description	Delete
There are no U N S P S C Class found for this approval path.			 Save & Continue Add U N S P S C Segment-Family/Class Delete All U N S P S C Segment-Family/Class Reset	14. All the appropriate codes are saved on the **UNSPSC Code** tab. You add or delete codes at any time. For example if a purchasing user in your agency finds that a commodity or service that requires approval through this path is being missed, the OA can return to this path and add additional UNSPSC codes.

Screenshot	Directions

Approval Path IT001 - IT Purchases

General | Change Order | Misc/Freight | Department/Location | Email | U N S P S C Code | Vendor | Summary

General Information

Approval Path ID:	IT001	Description:	IT Purchases	Organization:	1080 - Operational Services Division
Approval Type:	IT001 - IT Approval	Dollar Range:	$0.00 to $150,000.00	Roles:	Basic Purchasing Department Access
Status:	Active				
Send Email:	Yes	Customize Email Content:	No		
Doc Types (Doc Sub Types):	Requisition Unposted Bid Evaluated Bid Purchase Order PO Change Order				

Approvers

Approver User	Level	Type
Alyssa Arnold	0	Primary

Change Order

Apply approval path for all changes to document was selected by the user from the Change Order Tab.

Misc/Freight

No Misc/Freight options have been set

Approval Departments/Locations

No threshold was specified for the Miscellaneous or Freight Charges for this the Invoice Approval Path therefore this approval path will be attached to any invoice that meets the other criteria and has any Miscellaneous or Freight Charges.

Approval U N S P S C Codes

U N S P S C Segment-Family List:

Segment-Family ID	Description
43-19	Communications Devices and Accessories
43-20	Components for information technology or broadcasting or tel
43-21	Computer Equipment and Accessories
43-22	Data Voice or Multimedia Network Equipment or Platforms and
43-23	Software

U N S P S C Class List:

Segment-Family-Class	Description
There are no U N S P S C Class found for this approval path.	

Vendors

No vendors have been selected

[Add New Approval Path] [Clone Approval Path] [Print] [Exit]

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15. **Summary tab:** Allows you to view all the information entered for this path.

The path does not require submission, and is active until changed or removed.

If you need to create a similar approval path, you can use the **Clone Approval Path** button to create an exact copy of this approval path, and then and edit it. Navigate through the tabs as we did in this example.